



ROMANIA MEDIA LANDSCAPE

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Country Overview

A RENEWED EXPORT MARKET AND A SHIFT TOWARD MANUFACTURING, HAS HELPED COUNTRY'S WEALTH

Overview of Romania



CAPITAL
Bucharest

REGION
Europe

GDP PER CAPITA, PPP
\$33,340

GDP
\$250 billion

POPULATION
19,356,544

AREA
238,391 SQ.KM

Romania is the largest of the Balkan nations, tucked between Bulgaria and Ukraine in southeastern Europe along the Black Sea.

Romania has one of the lowest birth rates in the world, and poor national infrastructure and social programs put its aging population at risk.

Romania's tourism industry, increasingly drawing visitors to the picturesque countryside, is one of the fastest growing in Europe.

Media Consumption Overview

TV IS THE PREVALENT MEDIUM IN ROMANIA



92% of Romanians
consume TV on a daily



One of the most trusted
mediums



Print has declines over
the years but still
reaches millions



Internet penetration has
risen steadily in recent
years to 80% of
households

TV Consumption

TV IS THE MOST CONSUMED TRADITIONAL MEDIA

| TV Channel | Viewership 2020 (000') |
|------------|------------------------|
| Pro TV | 678 |
| Antena 1 | 530 |
| Kanal D | 427 |
| Romania TV | 284 |
| Antenna 3 | 198 |

- The television market is dominated by two companies: Central European Media Enterprises (CME), and Intact Media Group. The two groups together control almost half of the Romanian audience
- Romanians spend 3.3 hours on average watching TV during the week and 3.7 hours during weekends
- The younger demographic is usually watching TV an hour less than the older people
- Romanians are still watching the classic TV format, the linear TV, rather than online TV

TV Consumption

TOP TV CHANNELS



PRO-TV

Pro TV

Pro is a Romanian free-to-air television network, launched in December 1995. Targeting urban adults aged 30 to 50, Pro TV uses a programming strategy of top international series and movies, as well as a wide variety of local productions including news programming, local entertainment and local fiction.



Channel D

Kanal D Romania is a nationwide television channel in Romania and part of Doğan Holding which is owned by the Turkish media tycoon Aydın Doğan. It's a General Entertainment channel.



Antena 1

Antena is a Romanian free-to-air television network owned by the Antena TV Group, part of the Intact Media Group. Its programming consists of soap opera shows, football matches and entertainment programmes.



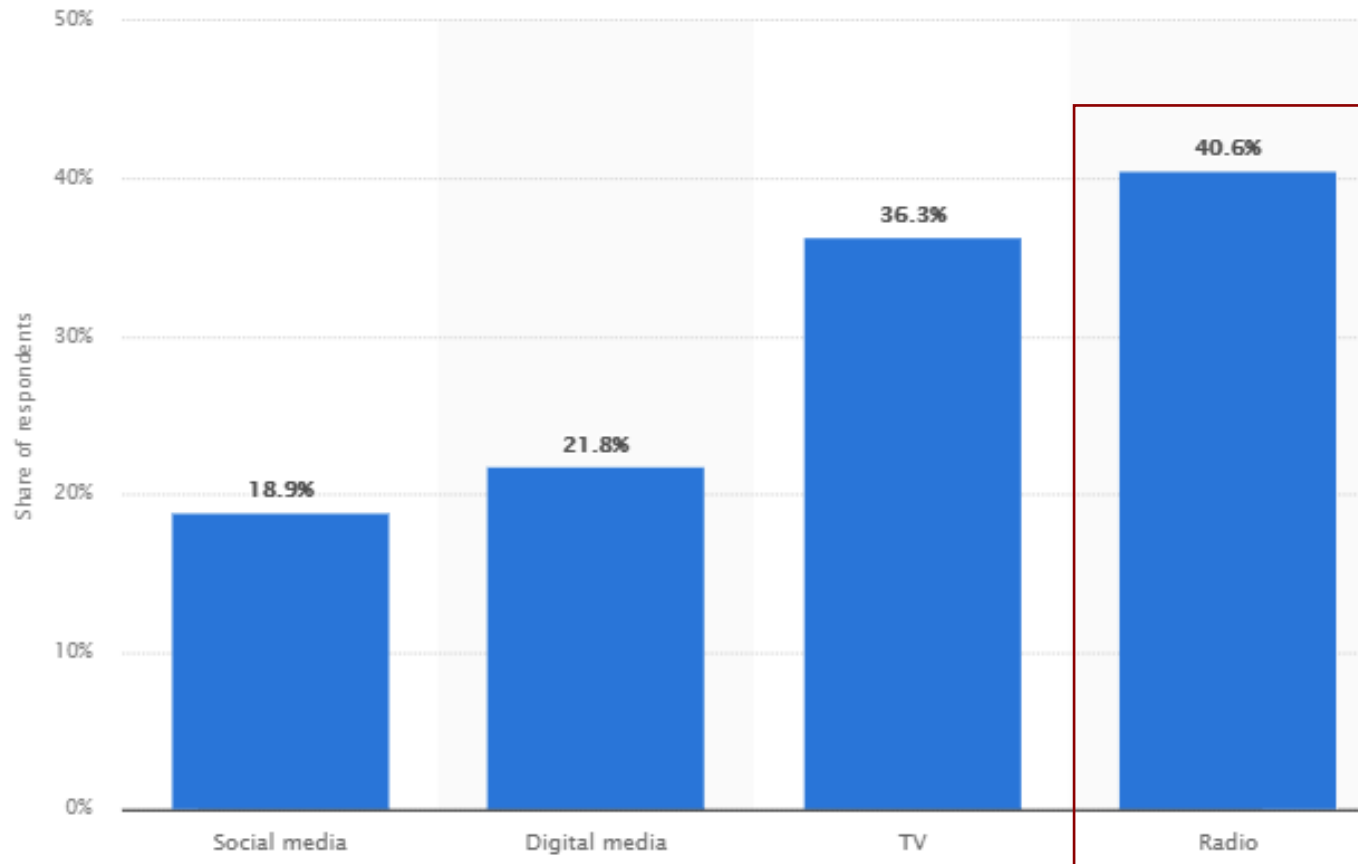
Romania TV

Romania TV is a 24-hour Romanian news television channel, launched on 23 October 2011. It is known for its high-quality talk shows.

Radio Consumption

RADIO IS STILL A POPULAR MEDIUM FOR ROMANIANS

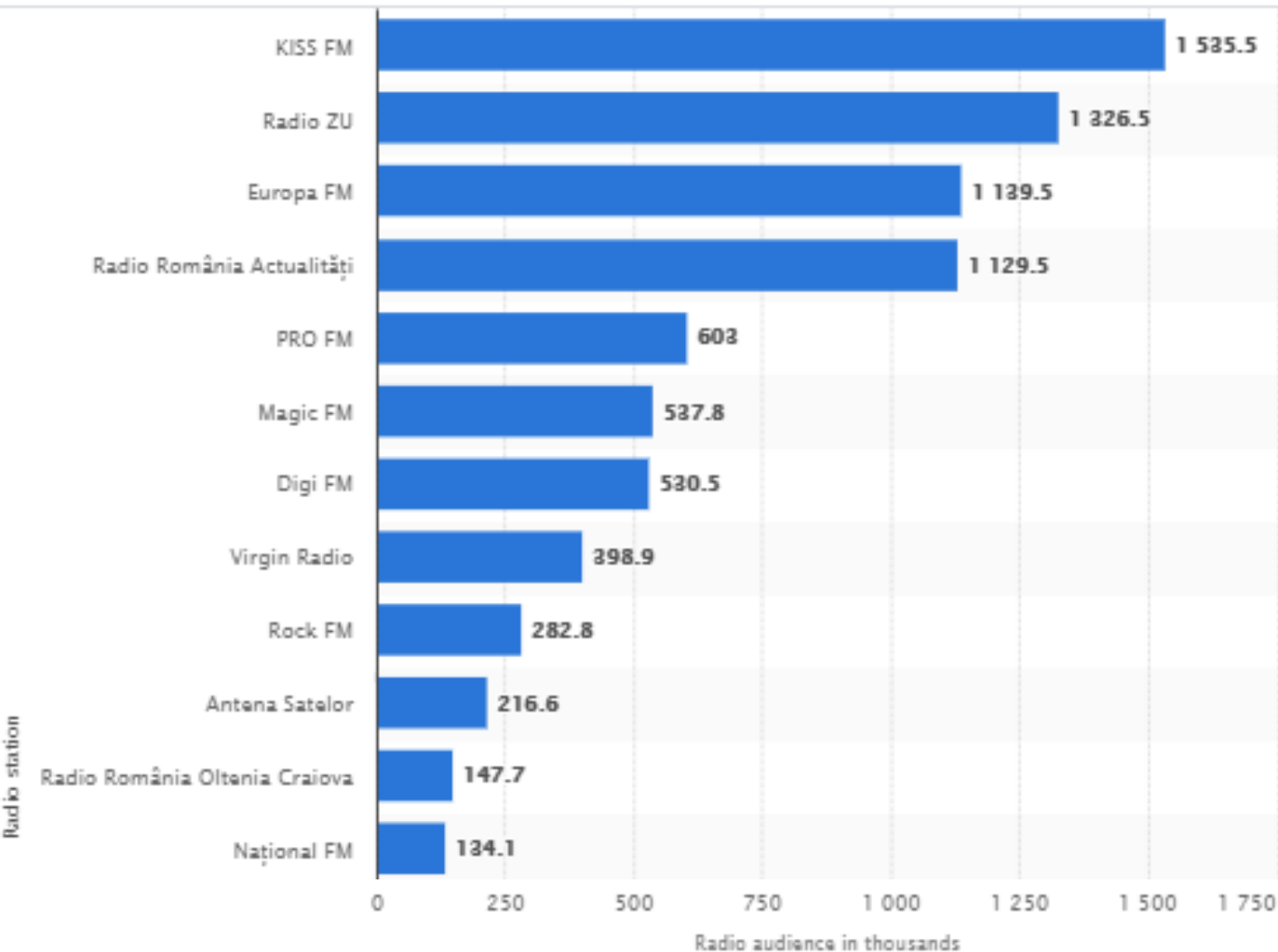
Trust in media channels for news consumption (2021)



- 40.6% of Romanians think that radio is the most reliable source of information and consume it for trustworthy news regularly

Radio Consumption

TOP RADIO STATIONS



Kiss FM is a Top40/Hit Radio station from Romania, owned by ANT1 Group.



Radio ZU is a radio station in Romania, launched on September 29, 2008, by the media company, Intact. Radio ZU focuses on the Contemporary Hit Radio format and has a generalist program, with 60% of its own production



Europa FM is a Romanian radio station which started airing on 26 May 2000. Its programming consists of a variety of shows, including news, music and morning shows.

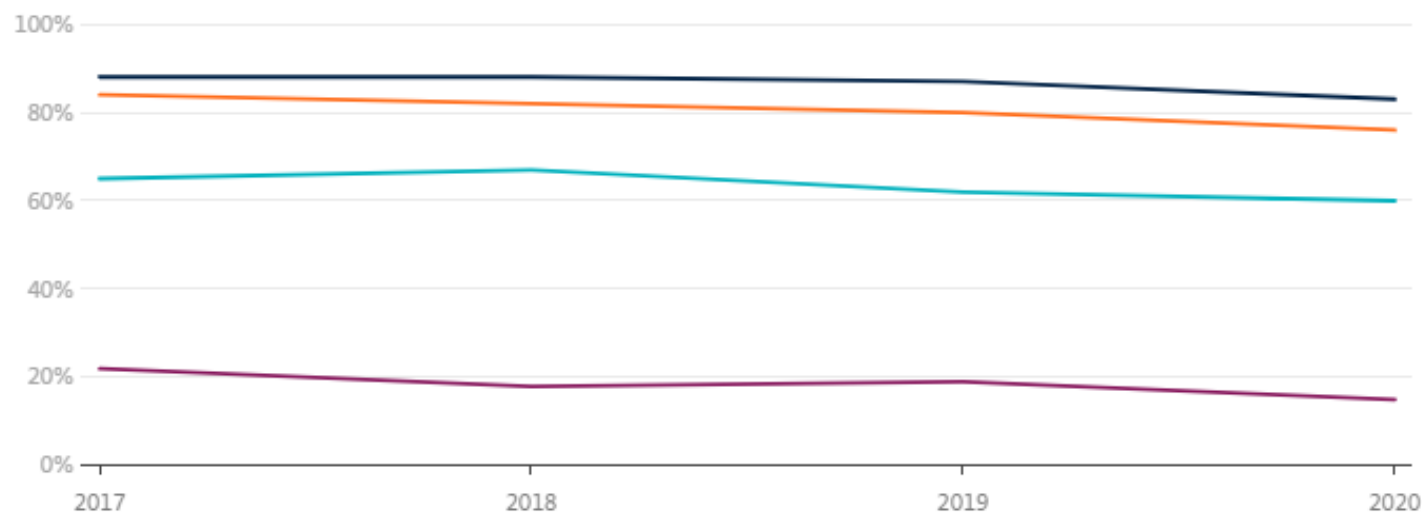
Print Consumption

THE ROMANIAN PRINT PRESS MARKET IS RICH AND DIVERSIFIED

SOURCES OF NEWS: 2017-2020

Romania

TV Print Online (incl. social media) Social



- Tabloid is the most popular form of newspaper being read in Romania
- The quality newspaper title is Adevarul, although the circulation numbers remain low in relation to popular tabloids such as Click (Adevarul Holding)

Print Consumption

TOP PRINT TITLES



Adevărul Circulation: 4,800

Adevărul is a Romanian daily newspaper, based in Bucharest. The newspaper's website features a blog portal where, similar to the Huffington Post model, writers of every political stripe can post comments for free.



Click! Circulation: 200,000

Click! is a Romanian tabloid newspaper owned by Adevărul Holding media company. Click! is more popular than serious dailies in the country.



Libertatea Circulation: 30,000

The daily newspaper Libertatea (Freedom) has been around since December 22, 1989. It is one of the few newspapers in Romania that covers a broad spectrum of opinions from conservative to economically liberal to left in its commentaries.

Digital Consumption

THE NUMBER OF INTERNET USERS IN ROMANIA INCREASED BY 3% BETWEEN 2021 AND 2022



Digital Consumption

ROMANIANS SPEND MOST OF THEIR TIME ON YOUTUBE

FEB
2022

MOST-VISITED WEBSITES: SIMILARWEB RANKING

RANKING OF THE MOST-VISITED WEBSITES ACCORDING TO SIMILARWEB, BASED ON ANNUAL WEBSITE TRAFFIC FOR FULL YEAR 2021

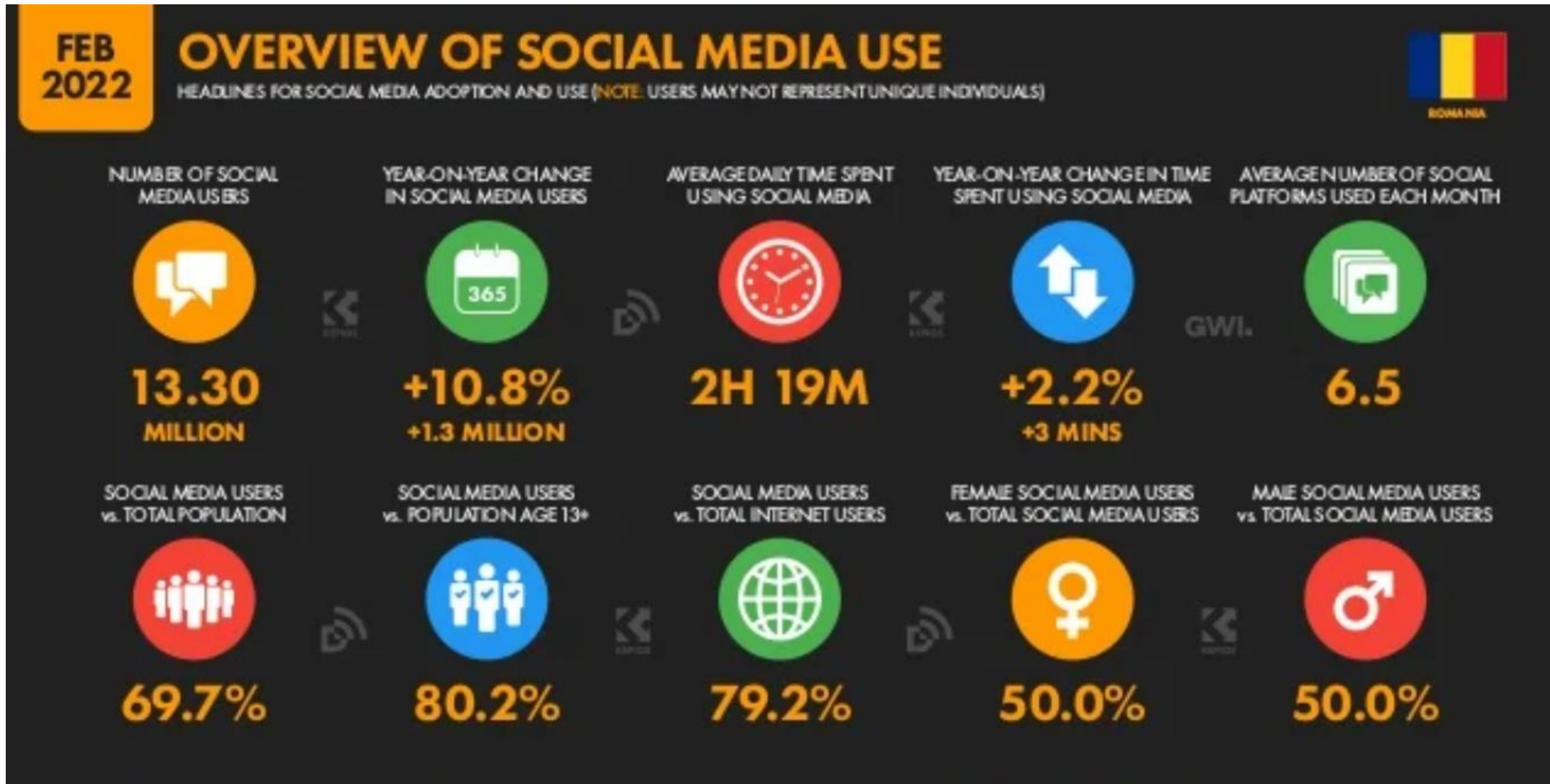


| # | WEBSITE | TOTAL VISITS | MOBILE SHARE | DESKTOP SHARE | TIME PER VISIT | PAGES PER VISIT |
|----|---------------|--------------|--------------|---------------|----------------|-----------------|
| 01 | GOOGLE.COM | 4.14B | 55.7% | 44.3% | 10M.53S | 8.33 |
| 02 | YOUTUBE.COM | 1.95B | 19.2% | 80.8% | 22M.55S | 13.49 |
| 03 | FACEBOOK.COM | 1.53B | 49.9% | 50.1% | 11M.04S | 9.79 |
| 04 | GOOGLE.RO | 477M | 38.5% | 61.5% | 8M.03S | 12.09 |
| 05 | YAHOO.COM | 407M | 20.4% | 79.6% | 7M.58S | 6.11 |
| 06 | EMAG.RO | 357M | 56.9% | 43.1% | 7M.06S | 8.39 |
| 07 | WIKIPEDIA.ORG | 267M | 59.4% | 40.6% | 3M.54S | 3.20 |
| 08 | VODAFONE.COM | 253M | 99.1% | 0.9% | 1M.09S | 1.80 |
| 09 | OLX.RO | 245M | 56.6% | 43.4% | 8M.40S | 9.43 |
| 10 | XNXX.COM | 242M | 93.3% | 6.7% | 13M.49S | 11.74 |

| # | WEBSITE | TOTAL VISITS | MOBILE SHARE | DESKTOP SHARE | TIME PER VISIT | PAGES PER VISIT |
|----|------------------------|--------------|--------------|---------------|----------------|-----------------|
| 11 | DIGI24.RO | 225M | 72.2% | 27.8% | 2M.45S | 2.54 |
| 12 | INSTAGRAM.COM | 214M | 49.8% | 50.2% | 9M.04S | 12.20 |
| 13 | XVIDEOS.COM | 1.55M | 87.5% | 12.5% | 13M.42S | 10.55 |
| 14 | DIGISPORT.RO | 1.51M | 74.8% | 25.2% | 4M.35S | 2.77 |
| 15 | WHATSAPP.COM | 1.46M | 13.7% | 86.3% | 2M.55S | 1.49 |
| 16 | PORNHUB.COM | 1.44M | 82.2% | 17.8% | 8M.26S | 6.61 |
| 17 | FILMESERIALEONLINE.ORG | 139M | 13.2% | 86.8% | 5M.48S | 3.96 |
| 18 | ADEVARUL.RO | 138M | 73.1% | 26.9% | 3M.16S | 2.55 |
| 19 | NETFLIX.COM | 131M | 8.7% | 91.3% | 7M.23S | 4.17 |
| 20 | GSPRO | 121M | 72.1% | 27.9% | 4M.54S | 2.90 |

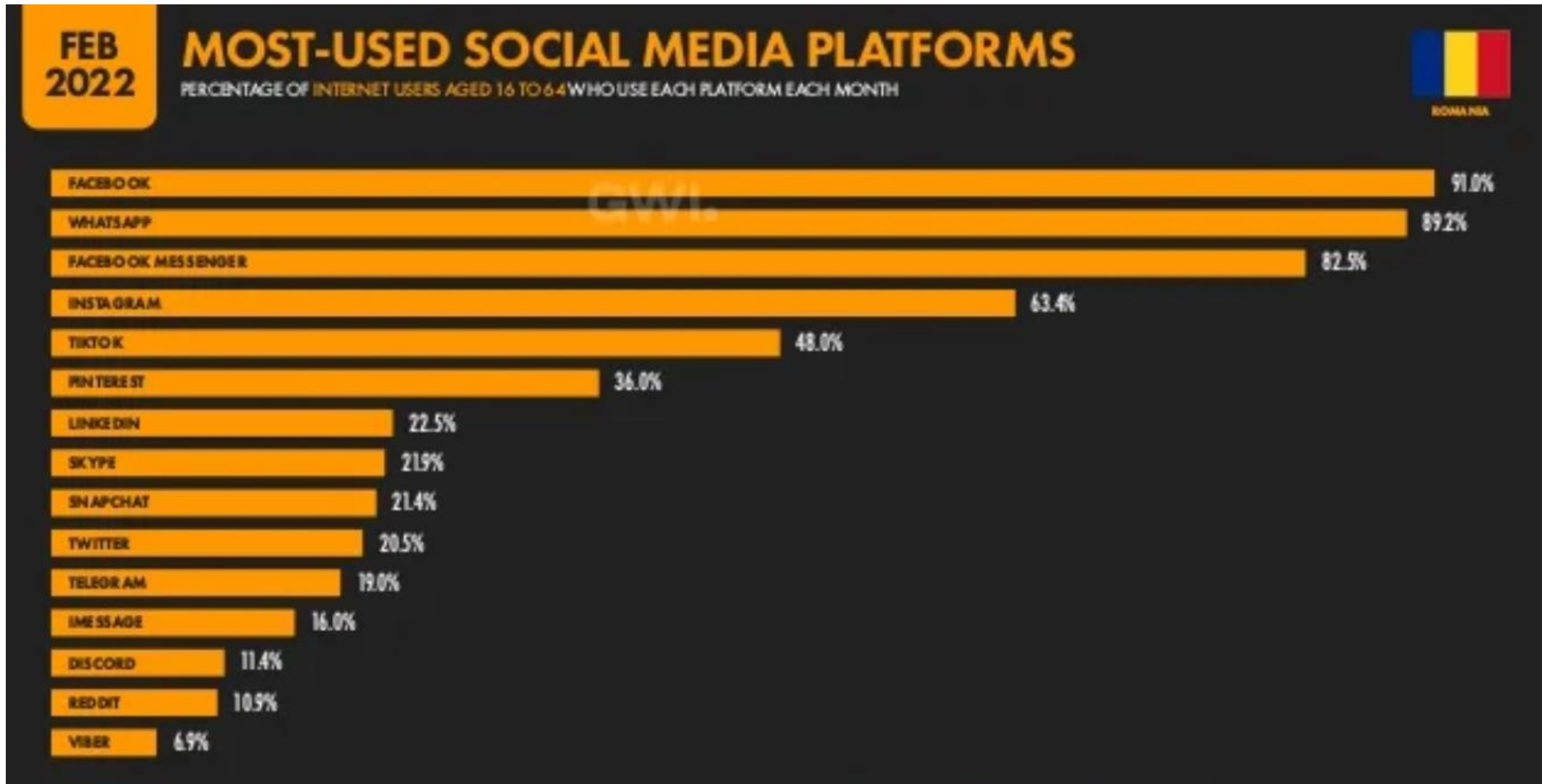
Digital Consumption

THE NUMBER OF SOCIAL MEDIA USERS IN ROMANIA INCREASED BY 10.8% BETWEEN 2020 AND 2021



Digital Consumption

THE MOST USED SOCIAL MEDIA PLATFORM IS FACEBOOK, FOLLOWED BY WHATSAPP



Outdoor Sites

ROMANIA



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